

October 1999

Dear EDEExpress Users:

We are pleased to release EDEExpress for Windows, Version 5.4. This version resolves a number of issues existing in previous versions of 1999-2000 EDEExpress. The details of these changes are located in the section "Issues Fixed in EDEExpress, Version 5.4."

We have enclosed the following items in this letter:

- Procedures for installing the upgraded version,
- Set of important reminders,
- List of configuration management issues we implemented in Version 5.4, and
- Results gathered from EDEExpress benchmark testing.

What You Should Do

- Review the information attached to this letter, and
- Use the attached instructions to install Version 5.4 on your computer.

If You Need Further Information

The EDEExpress Customer Service staff of the Central Processing System (CPS) can handle all of your EDEExpress for Windows questions regarding:

- Installation issues,
- Software problem resolution,
- Software functionality, and
- Technical assistance.

You can reach them Monday – Friday, 7:00 a.m. – 7:00 p.m. (Central Time), at **800/330-5947**. You may also email inquiries, comments, or suggestions 24 hours a day to **CPS@NCS.COM**. A representative will respond within 24 hours. Questions regarding CPS can also be sent to the SFATech listserve; for more information on subscribing to SFATech, please review the SFATech section at <http://www.ed.gov/offices/OSFAP/sfatech/index.html>.

Sincerely,

CPS Customer Service

Enclosures

EDExpress for Windows, Version 5.4

The Department is pleased to announce the release of 1999-2000 EDExpress for Windows, Version 5.4.

TABLE OF CONTENTS

Upgrade Installation	3
Installing to a Stand-Alone Computer	3
Installing to a Network	3
Warning	3
Reminders	4
Back Up Your Database Weekly	4
Optimize Your Database by Using Software Utilities	4
Run the Repair Database Utility	4
Improve EDExpress Performance by Using the Compact Database Utility	4
Prevent Problems by Using the Verify Database Utility	5
Issues Fixed in EDExpress, Version 5.4	6
Global	6
Application Processing	6
Packaging	6
Direct Loan	7
Pell	8
EDExpress Supports These Printers	9
Benchmarking Tests	10

Upgrade Installation

Version 5.4 is an upgrade to Version 5.3. You must continue to have Windows 95, NT, or 98 as your PC operating system to run this version. You must also be in compliance with the system requirements outlined in Action Letter #2 (October 1997).

To upgrade from Version 5.3 to Version 5.4, you must perform three procedures:

1. Back up your Version 5.3 database.
2. Install Version 5.4.
3. Perform a database update.

Installing to a Stand-alone Computer

To upgrade from Version 5.3 to Version 5.4 on a stand-alone computer or workstation:

1. Back up your Version 5.3 database.
2. Select the Custom Install option during your stand-alone or workstation installation.
3. Mark the checkbox for Pell and any other modules you use (so module fixes can also be installed). Do NOT mark the "Database" checkbox unless you are performing a first-time installation or want to overwrite your Version 5.3 database. (Remember, if you choose to overwrite your Version 5.3 database, all data previously entered is lost.)
4. After you upgrade from Version 5.3 to 5.4, reboot your PC. Then log on to EDEExpress to allow the software to perform a one-time-only update of your EDEExpress database. **For this reason, we strongly recommend you perform a full backup of your Version 5.3 database prior to installing Version 5.4.**

Installing to a Network

If you are running EDEExpress in a network environment,

1. Back up your Version 5.3 database.
2. Complete ALL of your workstation installations on all relevant production PCs. Reboot each PC after you have finished installation.
3. Access EDEExpress from ONE designated workstation. EDEExpress performs a one-time-only update of your EDEExpress database. **For this reason, we strongly recommend you perform a full backup of your Version 5.3 database prior to installing Version 5.4.**

Warning

You must perform your upgrades in version number order. If you have not yet updated from Version 5.1 to 5.2, or from 5.2 to 5.3, please do so by using the above directions prior to upgrading to Version 5.4. Remember, you MUST access the EDEExpress software and allow EDEExpress to perform the database update between each version upgrade as directed above.

For further information regarding the EDEExpress installation process, please consult the *EDEExpress Installation Guide* sent with Version 5.0.

Reminders

Back Up Your Database Weekly

Before you upgrade your EDEExpress to Version 5.4, you must back up your database so that you don't lose your data.

You should back up your EDEExpress database file, EXPRES90.MDB, regularly. We recommend that you back up your files at least weekly.

EDEExpress for Windows does not include a backup utility. You must use your own backup software. You should test your backup software to verify its reliability to successfully restore your backups.

Optimize Your Database by Using Software Utilities

The EDEExpress for Windows software contains database utilities that allow you to optimize your database if you encounter problems. We recommend that you repair, compact, and verify your database once a week. If all three are successful, back up the database (see section above).

Run the database utilities in the following order:

1. Repair database.
2. Compact database.
3. Verify database.

For specific information regarding repair, compact, and verify, see the appropriate section below.

Run the Repair Database Utility

The repair database utility resolves inconsistencies (also called a database corruption) in records storage. Events such as a power outage or a LAN failure can corrupt your database if it occurs while EDEExpress for Windows updates your records.

EDEExpress may not detect database corruption, so if your system behaves unpredictably (for example, you start getting database error messages), use the Repair Database Utility.

Running this utility weekly helps to prevent database problems.

Warning: Before using this utility, be sure you have space on your hard drive that is at least equal to the current size of the database.

Improve EDEExpress Performance by Using the Compact Database Utility

The compact database utility improves the performance of EDEExpress for Windows by optimizing the database (EXPRES90.MDB) file and reclaiming space on your computer's hard drive. As you add, modify, or delete records in EDEExpress for Windows, the database file can become fragmented.

Running this utility weekly makes the database files smaller and improves system performance.

Warning: Before using this utility, be sure you have hard drive space available at least equal to the current size of the database.

Prevent Problems by Using the Verify Database Utility

The verify database function checks for data relationship integrity in your database. If EDEExpress for Windows crashes or abnormally halts processing, a record may be missing one of its associated records. Verify Database recreates the missing record.

Running this function weekly helps to prevent problems. Before using this utility, be sure you have hard drive space available at least equal to the current size of the database.

Issues Fixed in EDEExpress, Version 5.4

We implemented the following configuration management issues per software module in EDEExpress for Windows Version 5.4.

Global

- 1974 The software allows for records to be globally packaged with a packaging status of N and a document tracking status of P; these records appear in the grid when choosing selected records. This can also be done using SSN and Last Name ranges. Packaging and Unpackaging can be done from the record level as well.
- 2084 The database and the executable file must have the same version number in order for the executable to run.

Application Processing

- 1973 The Transaction Verification flag and the Verification Tracking flag now print with the correct values.
- 1992 When using Quick Correct to add an institution to ISIR transaction 99, the ISIR appears on List-Processed ISIRs after it has been imported.
- 2046 State of Legal Residence will only accept 01-12 for month.

Packaging

- 1931 Changes to Fund Decisions on the Awarded Funds window save and display properly.
- 1942 Software packages properly at the global level as well as the record level with G aid types in the methodology.
- 1962 If the external import add file contains invalid values, the software creates the packaging record with a status of N.
- 1963 Multiple Entry allows changes to Fund Amounts.
- 2010 The software recognizes all ISIRs with Packaging Data when importing from Packaging into Pell.

Direct Loan

- 1966 The Direct Loan Volume Measurement Tools report calculates the gross and net disbursement amounts and now calculates negative and positive adjustments.
- 1976 When you import a Disbursement Acknowledgement, the Edit report displays the reject code(s) for any rejected disbursement records.
- 1998 When you update an originated loan record the Last Update Date is recorded on the loan screen. The origination date is not updated and remains the date when the loan origination record was ready for export.
- 2003 In the External Import Loan Origination Add File (DIEA00OP), the valid field content for field # 44 (Additional Unsubsidized Amount) includes the values of N and blank to designate "No."
- 2004 The External Export file (DEER00IN) record layout now agrees with software. Field #31 – Loan Year is a four-byte field and valid field content is "9900."
- 2007 When a Loan Amount Approved and Loan Amount Requested are included in the Import External Change file (DIEC00IN), EDEExpress originates the loan record during the import process.
- 2033 When you print a List – Actual Disbursement report, the totals for Booked Net Amount, Unbooked Net Amount and Net Disbursement Amount are calculated for each loan type: Subsidized, Unsubsidized, and PLUS.
- 2036 A loan origination record with an incorrect origination fee is rejected by the LOC. When you import the Loan Origination Acknowledgement file into EDEExpress the loan status is set to E (Error). When the loan status is E (Error) or R (Ready), EDEExpress allows you to change the loan amount to zero and then update the origination fee.
- 2039 EDEExpress prints a separate manifest for Stafford loans and a separate manifest for PLUS loans. When you print a PLUS manifest, the certification is updated to certify that each student is enrolled instead of each borrower.
- 2045 If a loan is deleted in the EDEExpress Direct Loan module, you can re-import the same ISIR data into EDEExpress to create a new loan, if desired.
- 2068 In Direct Loan Setup, you have the option to print your promissory notes using either the Local Address or the Permanent Address. If you select to print the student's Local Address and no Local Address is recorded in EDEExpress on the Demo tab, then the Permanent Address prints on the promissory note.
- 2070 When a Master Promissory Note is created for a subsidized and unsubsidized loan, only the subsidized loan ID prints on the manifest. Once the subsidized loan ID prints on a Manifest, the Include on Manifest flag is set to N (No) for both the subsidized and unsubsidized loan so that neither loan ID appears on a future manifest.
- 2077 The record layout for the External Export Loan file that prints from EDEExpress is updated to match the published record layout in the 1999-2000 Direct Loan Technical Reference.
- 2081 When you print a PLUS Application/Promissory Note, the Loan Amount Requested label is printed with a blank amount. This allows the borrower to request the desired amount of the PLUS loan.
- 2094 When you print a promissory note to a file, print formatting codes do not display.

- 2101 When you enter anticipated disbursement amounts manually or by multiple entry, EDEExpress
and correctly calculates the origination fee for all anticipated disbursements.
2102
- 2149 When a PLUS promissory note is printed for a borrower who is an eligible noncitizen with an
Alien Registration Number, EDEExpress prints the Alien Registration Number only on the
borrower's note.

Pell

- 2001 When importing ISIRs into the Pell module of the software, the software no longer
displays an error message for the Pell Origination ID for student records that don't have
existing origination records.
- 2024 When using Process/Multiple Entry/Pell and entering Social Security Numbers (SSN)
through an SSN file or by using the ellipsis button (...), you no longer receive a "No
records selected" message when the student record exists.
- 2032 The Electronic Statement of Account (ESOA) Detail Print Report now prints the Adjust
Report Date and Adjust Report Amount in the correct format.
- 2042 When importing a Year to Date file (YTD) with an apostrophe as part of the student's
name ID, the system no longer displays a database error message.
- 2047 The software exports the correct submitted amount and sign when exporting
disbursement records. The software no longer exports a negative symbol when a
negative amount is entered.
- 2048 When you import system-generated disbursements, the software now populates the
Submitted Amount field with the Accepted Amount field.
- 2058 When you create a query with the disbursement batch ID equal to a parameter value, the
software allows you to enter in the disbursement batch ID beginning with a "#D."
- 2067 If you change the Institutional Cross Reference field and it is the only field that has
changed, the software does not prompt you to select the record to send with the next
batch, as this field is not sent to RFMS.
- 2071 The software allows school codes with the second digit other than "0" to create
disbursement records using manual entry or external disbursement add.
- 2072 If you have multiple Pell Reporting Campus IDs defined, the software exports
disbursement records under the correct Reporting Campus ID.
- 2085 The Print Disbursement List Report displays the negative symbol correctly for negative
Submitted and Accepted Totals on the report.
- 2086 When printing the Print Disbursement List Report from the software, the Accepted
Amount justifies correctly.

- 2090 If a school creates many negative disbursement records in a disbursement batch, the software no longer prints a negative sign in the Reported Total of Batch in the trailer record in field positions 47 – 57, preventing RFMS from sending a reject batch code 208. The Reported Total of Batch is equal to the Total Origination Award Amount or Disbursement Amount reported in Origination, Disbursement, or Special Disbursement batches.
- 2106 When importing a negative disbursement in an external disbursement add file, the software reads the Debit/Credit Indicator flag (field position 47) correctly.
- 2110 The software prevents you from updating batched records through the multiple entry process.
- 2117 The Blocker institution, which is the institution that prevents another institution from
and paying a student more than 100% of their eligibility, receives Blocked MRR – PB and
2143 BC record type codes. The Blocked institution, which is the institution that is prevented
from paying a student more than 100% of their eligibility, receives Blocker MRR - PR
and RC record type codes and the system may create a transfer record for that
institution. The system displays ‘Blocked’ in the RFMS status. The same institution
receives the Unblocked MRR - PU record type code sent from RFMS.
- 2134 When importing the acknowledgement letter, if you submit a Special Disbursement
record to RFMS with a Submitted Amount that is less than the Accepted Amount, the
software imports the record without the import generating a “Total Payment for the
Payment Period – Award Amount” error message.
- 2138 When creating Special Disbursement records from the Disbursement Data - External
Import process, the Total Payment for the Payment Period imports correctly.
- 2150 If an Origination Record is batched and then a Year to Date Origination file is imported
(PGYR00OP) for a student, the software changes the batched origination status “B” to
an accepted origination status “A.”
- 2169 When importing a Year to Date Rebuild file, which includes Special Disbursements, the
software no longer blanks out the Total Payment for the Payment Period, Award amount
and the Cost of Attendance. The software updates the correct fields and allows you to
enter new Disbursement records.
- 2177 The software allows you to enter Special Disbursement records if the student has a
Verification W status code on the Origination tab.

EDExpress Supports These Printers

We tested the following printers that are supported in Windows NT 4.0, Windows 95, and Windows 98:

- HP LaserJet III si
- HP LaserJet 4
- HP LaserJet 4000 N
- HP LaserJet 4M
- HP LaserJet 4M Plus
- HP LaserJet 4 si
- HP LaserJet 5M
- HP LaserJet 5 si
- HP LaserJet 5 si MX
- HP LaserJet 6 MP

EExpress Benchmarking Tests

These benchmarking tests were performed on the previous version of EExpress, Version 5.3, to measure its performance in varying processing environments. These results will not change for version 5.4 but are provided for the new EExpress user.

Imports Benchmarking Tests

The table below reports the benchmarking results for EExpress import files. We tested the Import process during normal working hours using different operating systems, PC platforms, and import files (all files had approximately 400 records). We conducted these tests on a Pentium 200 with 64 MB RAM. For the network tests, the EExpress software was on the workstation and the database was on the server. The server used is a production server with approximately 200 simultaneous users. From previous benchmarking activities, we have not seen a performance difference between the Novell 3.12 environment and the NT server environment. Thus, we list only the Novell network environment below. The Time Elapsed column indicates the measurement of time starting when you click OK in the Import dialog box and the import process begins.

Component	Operating System	BM Volume	Time Elapsed	Network
Pell – ISIR Import Add	WIN 95	1000 records	36 sec	N/A
Pell – ISIR Import Add	NT 4.0	1000 records	9 min 10 sec	Novell
Pell – ISIR Import Add	NT 4.0	1000 records	30 sec	N/A
Pell – ISIR Import Add	WIN 98	1000 records	39 sec	N/A

Reports Benchmarking Tests

The table below reports the benchmarking results for EExpress reports and lists. We tested these reports in Windows NT, Windows 95, and Windows 98 on HP LaserJet III, 4, 4000N, 4M, 4M Plus, 4Si, 5M, 5Si, 5Si MX, and 6 MP printers. We conducted these tests on a Pentium 200 with 64 MB RAM. The Time Elapsed column indicates the measurement of time starting when you click OK in the EExpress Print dialog box and when the operating system (Windows NT/95/98) print dialog appears. The BM Volume is the number of records and approximate number of pages that were printed in the test.

Component	BM Volume	Operating System	Time Elapsed
Pell Disbursement List	Report	NT 4.0	2 seconds
Pell Disbursement List	Report	Win 95	2 seconds
Pell Disbursement List	Report	Win98	2 seconds
Pell Origination Record	Report	NT 4.0	2 seconds
Pell Origination Record	Report	Win95	2 seconds
Pell Origination Record	Report	Win98	2 seconds